knowledge15®
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Field Service with Geolocation: Track Agents & Tasks in One Pane

Melissa Moghaddam & Sean Barrett

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

Lab 1.1
Configuration

The Fuji release brings a new implementation of Field Services Management (previously Work Management) based on the new-to-Fuji Service Management core.

As part of Service Management core, Field Services Management (FSM) gets a new configuration page allowing the administrator to turn features on/off and choose among multiple behaviors available to the application.

In this lab, you get familiar with the new configuration page and set the options needed for the rest of this session.

Log on to Your Training Instance

1. Navigate to the unique instance URL provided to you.

2. Log on with provided credentials.

If You Are not at Knowledge

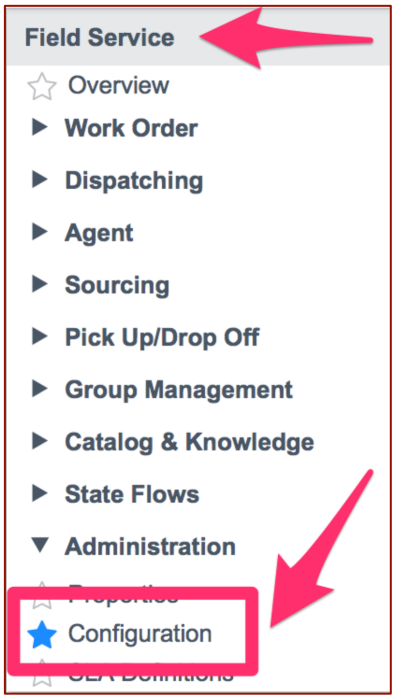
1. Navigate to **Plugins** and activate the following plugins:
   Field Service Management
   Field Service Management Geolocation
   SM Planned Maintenance

2. If you have the Knowledge15 update set for this lab, load it.

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Examine the Configuration Page

1. To make things easier, the Field Services menu is the first menu entry.
   Click **Field Services -> Administration -> Configuration**.



Configuration Page Sections

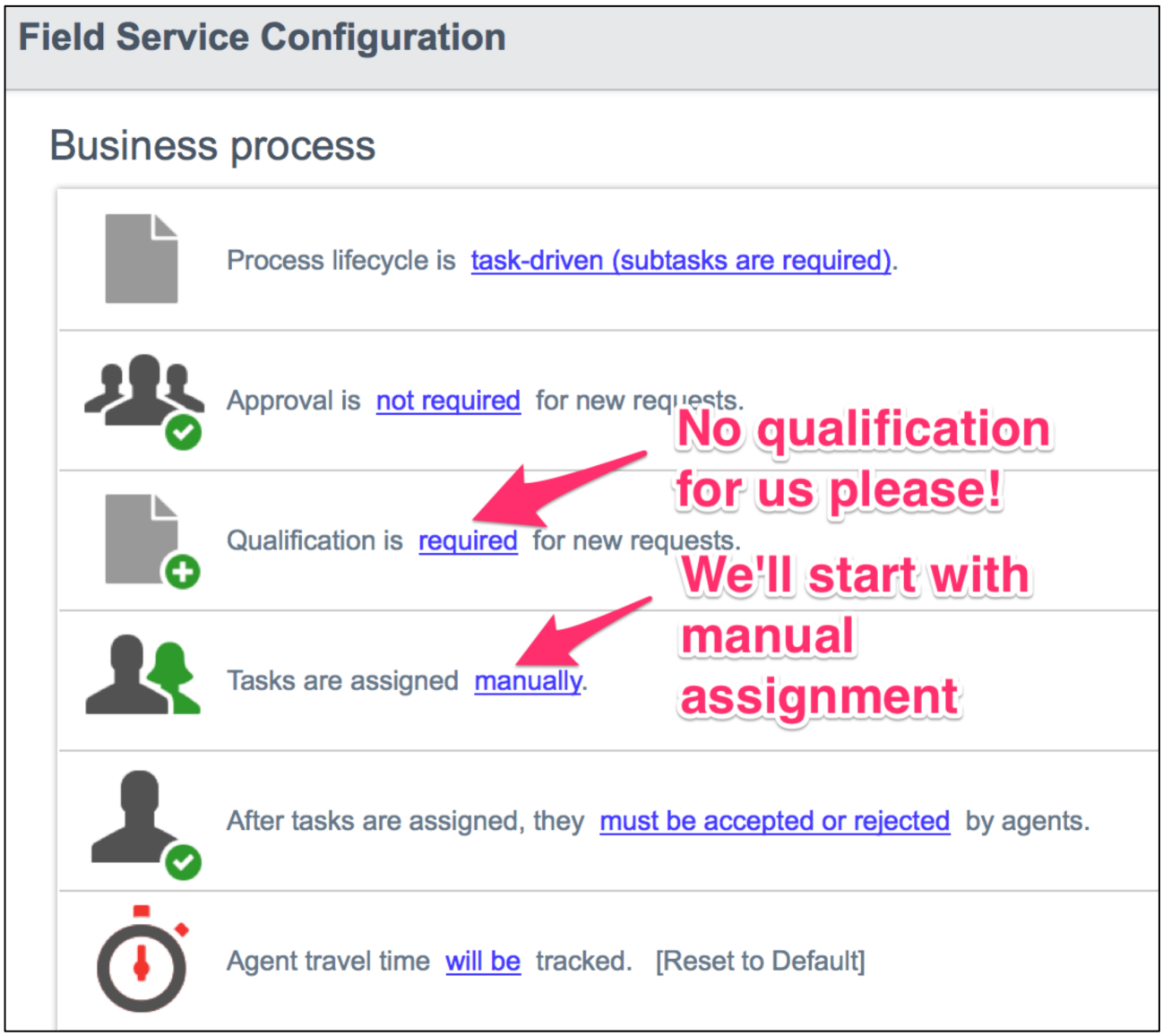
The configuration page has three distinct sections:

- **Business process**– controls the steps in the process flow. Defines which steps are to be used and which can be removed and hidden.
- **Additional options**– controls the behavior of specific steps in the process, such as whether templates created a product catalog item or task work notes roll up to the main request.
- **Assignment options**– controls the process of assigning tasks to agents. Available options change based on the type of assignment engine chosen.

Next, examine the sections.

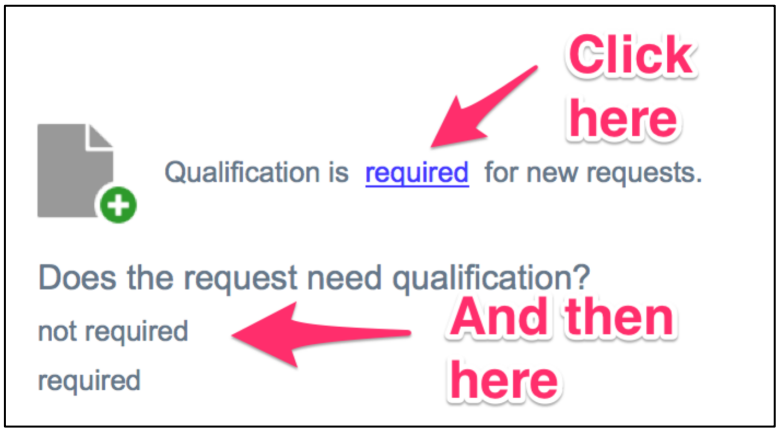
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Business Process Section

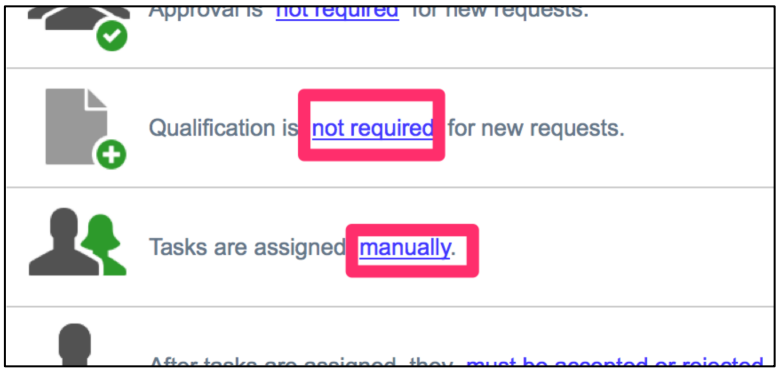


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1. Click the blue, underlined **required** in "Qualification is required for new requests" and in the options given, click **not required**.

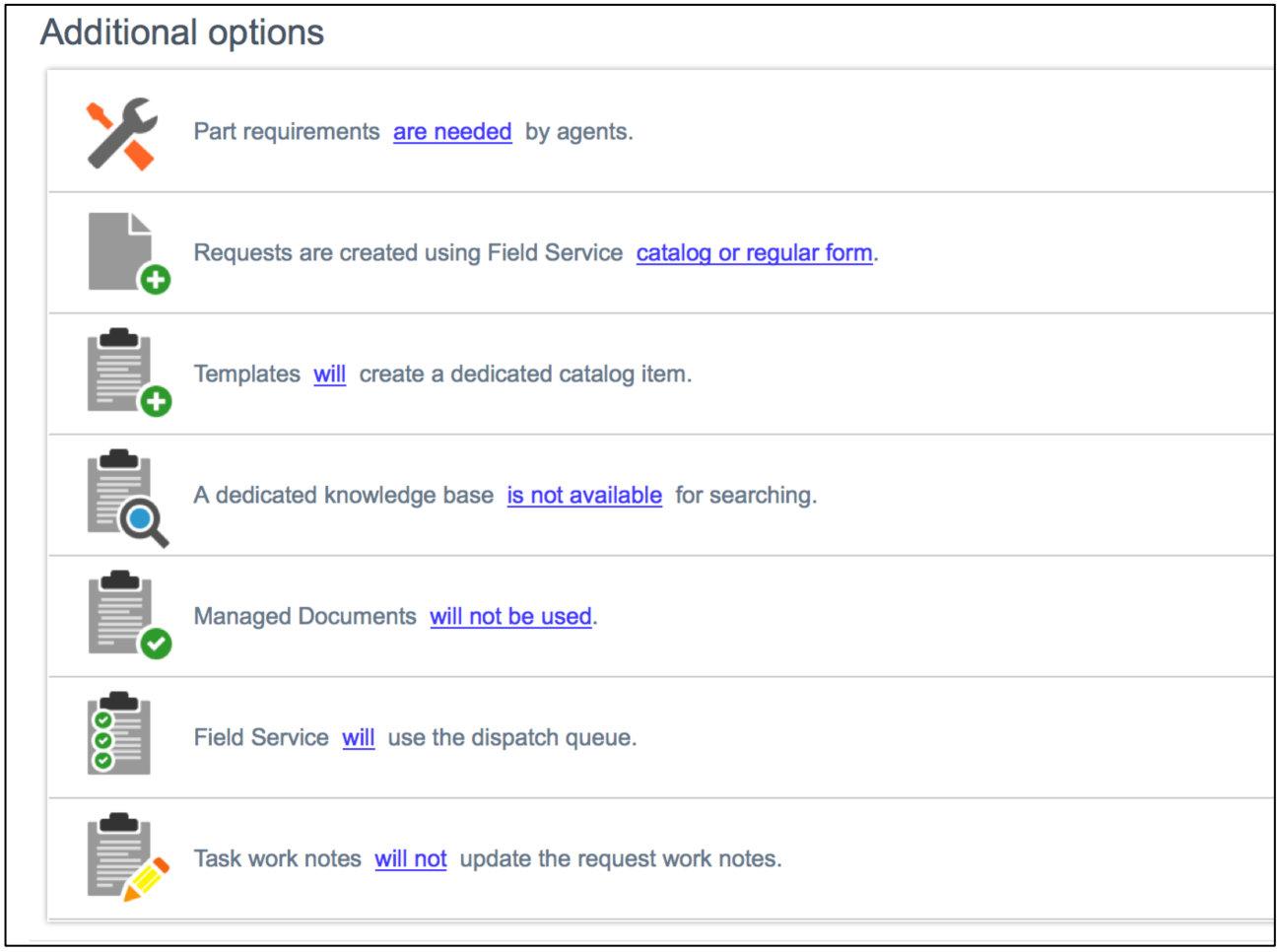


2. Your configuration screen should look like the example.



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Additional Options Section



1. Modify the configuration so Task work notes will update the request work notes.



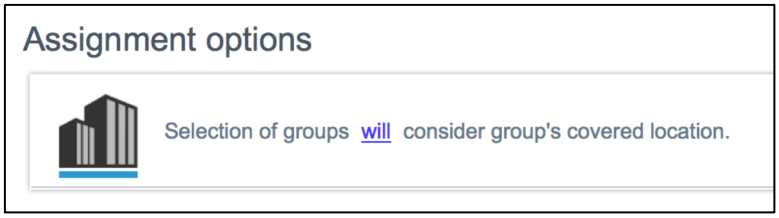
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2. Your Advanced options should now look like the example.

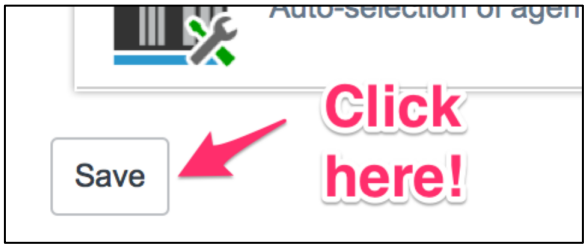


Assignment Options Section

With manual assignment, only a single configuration option displays. When you use auto-assignment, additional configuration options become available.



Save the Configuration



Explore other configuration options; just make sure not to save any additional changes you make. The application behavior would no longer match the lab.

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Lab Goal

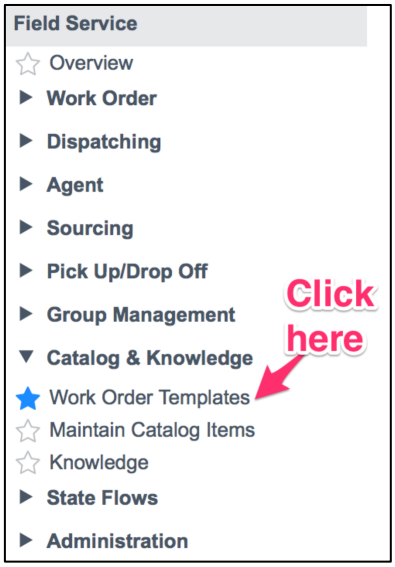
Lab 1.2 Create a Template

This lab explains how to create a work template. A work template is a predefined collection of tasks that can be used to generate a previously made work order. A work template can also be published to the Field Service catalog and used to generate a work order.

When creating a work order, you can define not only the tasks needed to complete the order but also the task relationships (which task depends on another), the estimated time needed, and skills required.

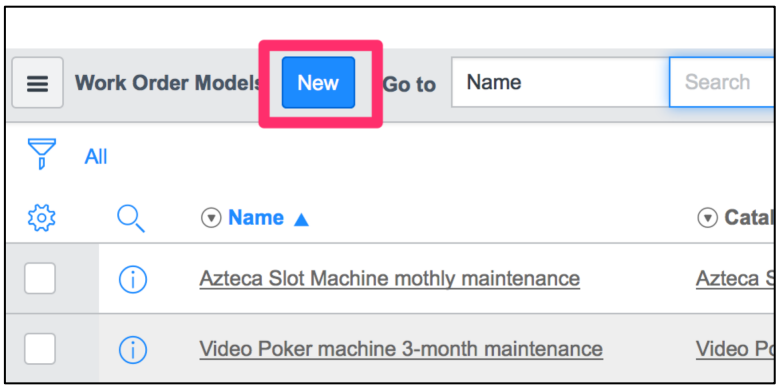
Create a New Work Template

1. In the **Field Service** menu, **Catalog & Knowledge** section, click **Work Order Templates**.



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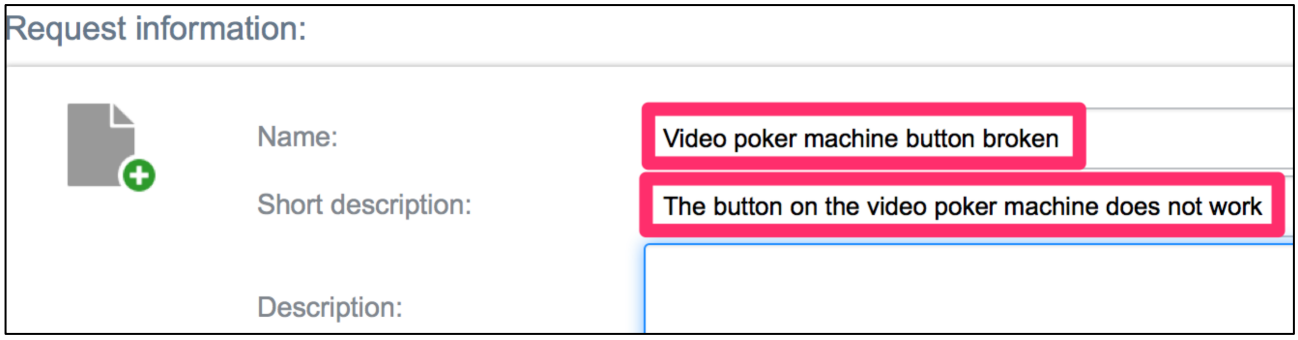
2. In the Work Order Models screen, click New.



3. In the **Name** field enter **Video poker machine button broken**.

4. In the **Short Description** field enter **The button on the video poker machine does not work**.

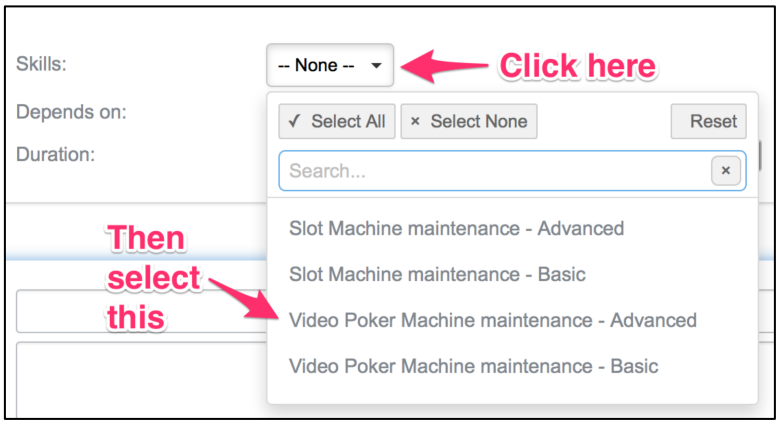
5. Your screen should look like the example.



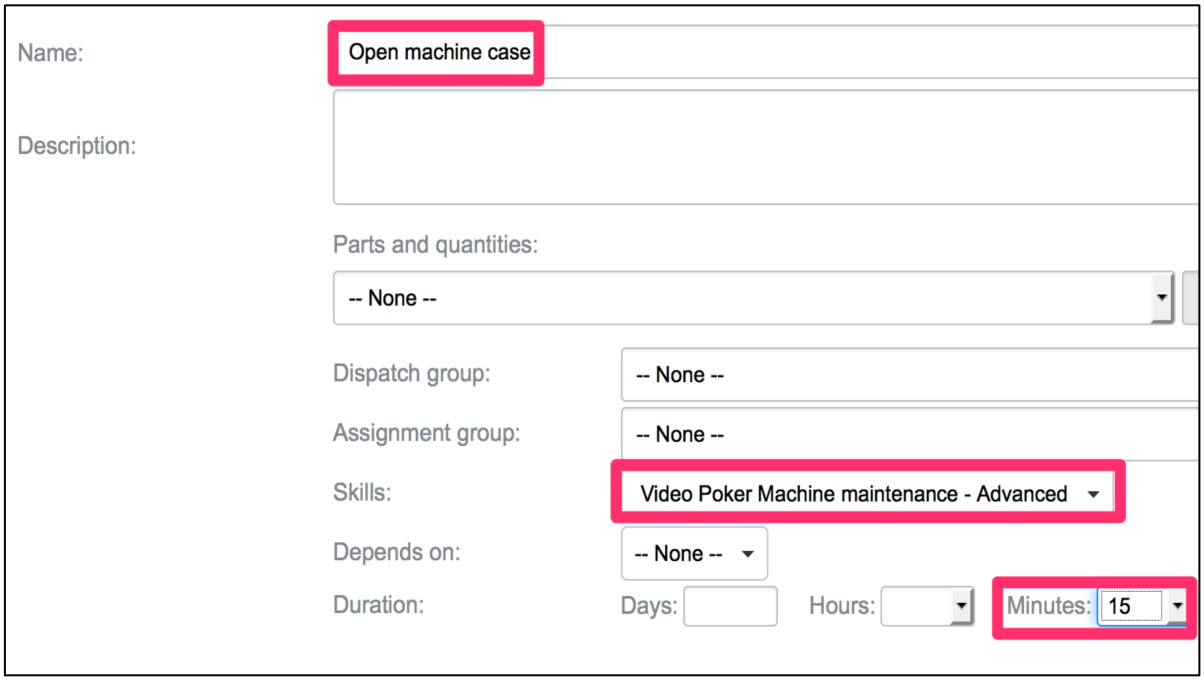
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6. In the Task Information section, fill the **Task 1** data:

   Name: **Open machine case**
   Skills: **Video Poker Machine maintenance – Advanced**
   Duration: **15 minutes**



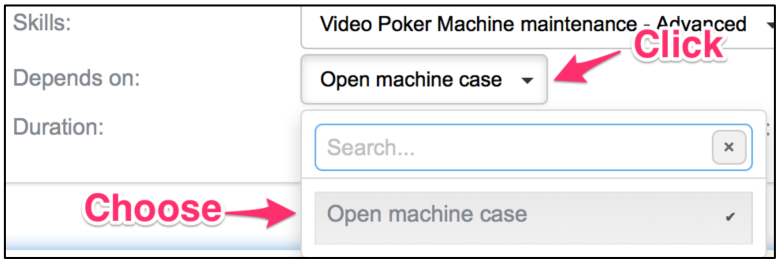
7. Your screen should looks like the example.



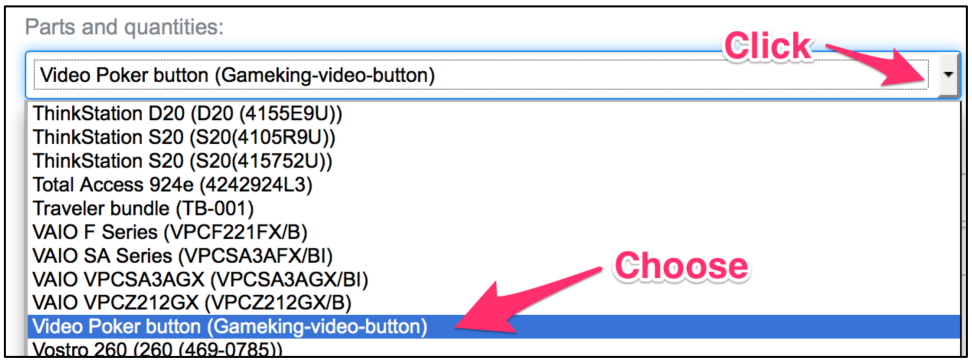
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8. For **Task 2**, set the following fields:

   Name: **Replace broken button**
   Skills: **Video Poker Machine maintenance – Advanced**
   Depends on: **Open machine case**
   Duration: **30 minutes**

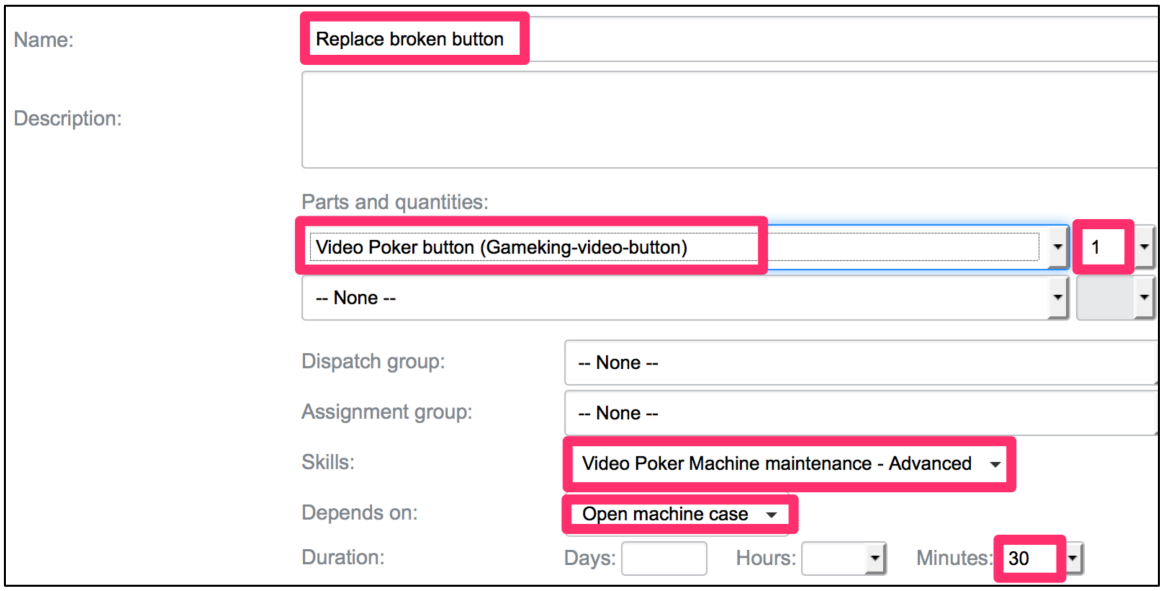


9. Require a part: the **Video Poker button (Gameking-video-button)**.



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10. Your screen should look like the example (note that the quantity of **1** was automatically defaulted for you).

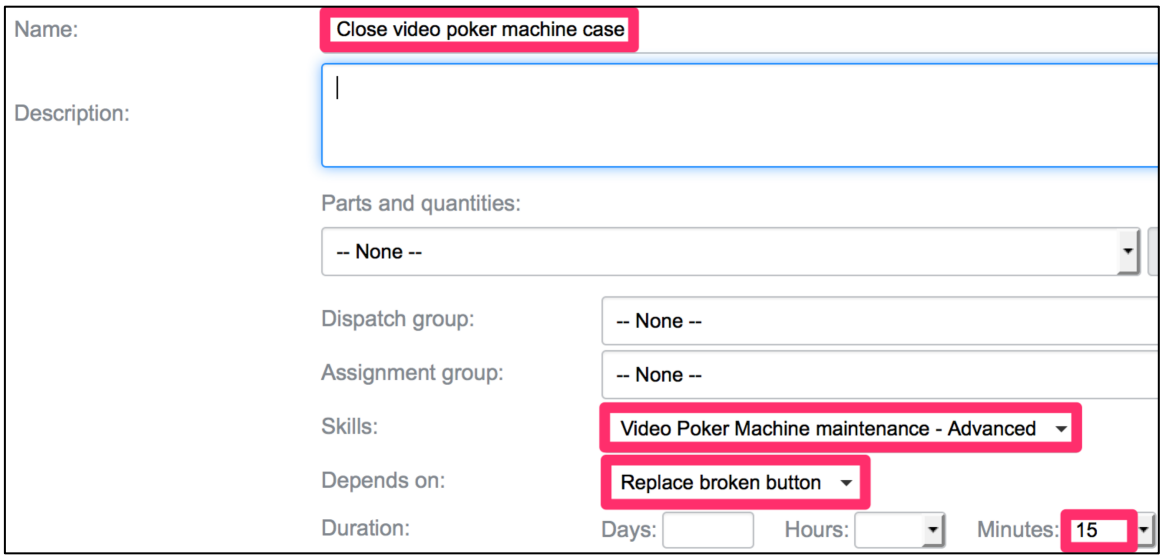


11. For **Task 3**, set the following fields:

    Name: **Close video poker machine case**
    Skills: **Video Poker Machine maintenance – Advanced**
    Depends On: **Replace broken button**
    Duration: **15 minutes**

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12. Your screen should look like the example.

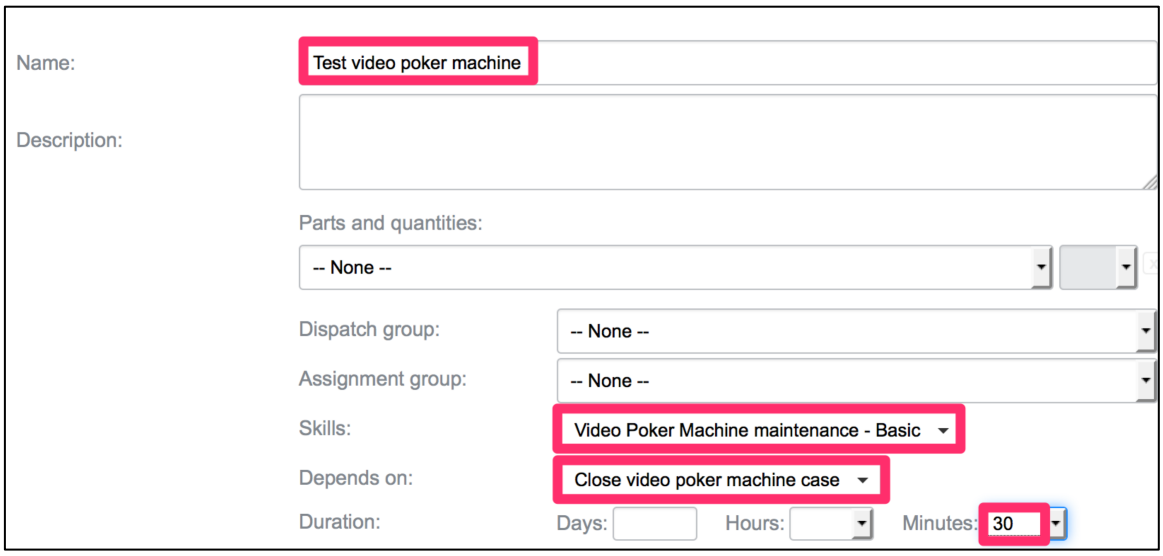


13. For **Task 4** (which was added for you automatically when you touched Task 3), set the following fields:

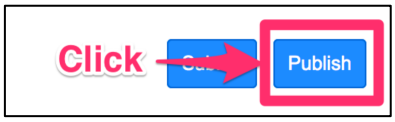
    Name: **Test video poker machine**
    Skills: **Video Poker Machine maintenance – Basic**
    Depends on: **Close video poker machine case**
    Duration: **30 minutes**

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14. Your screen should look like the example.

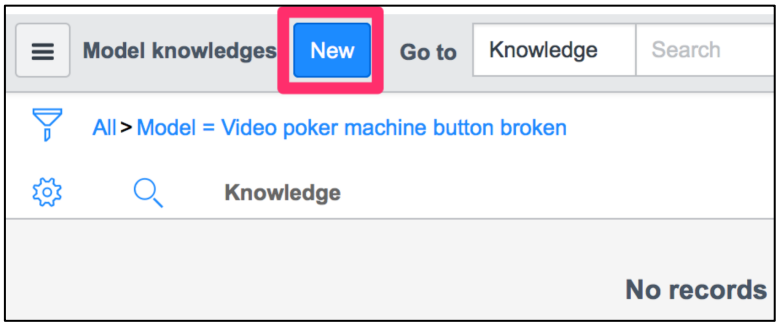


15. Publish the work template to the Field Service catalog (this also saves the template) by clicking **Publish**. By default, the catalog item is created in the default (and for us, only) category in the Field Service catalog.



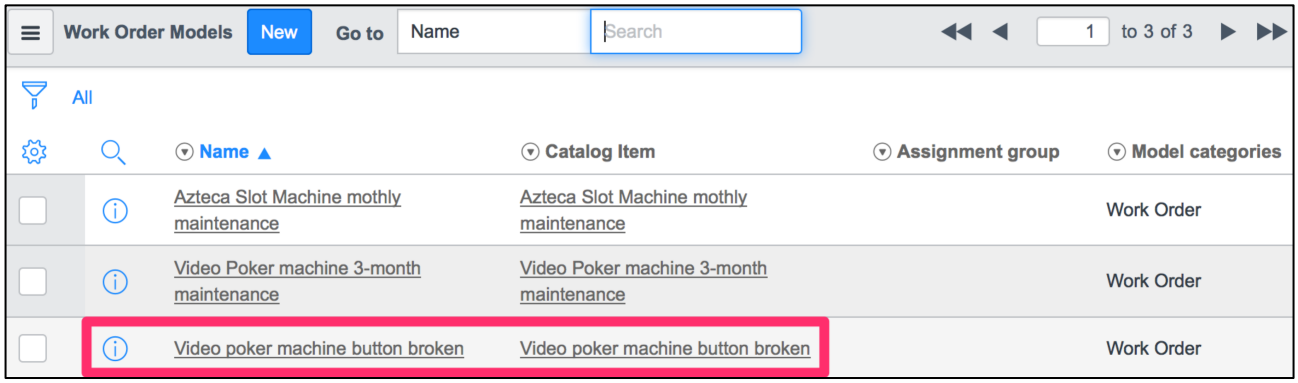
If needed, you can associate knowledge articles with this template, possibly to assist the agent in the completion of the task. In this lab, you do not associate a knowledge article with the work template.

The **Model = template name** appears only AFTER the work template is saved or published.



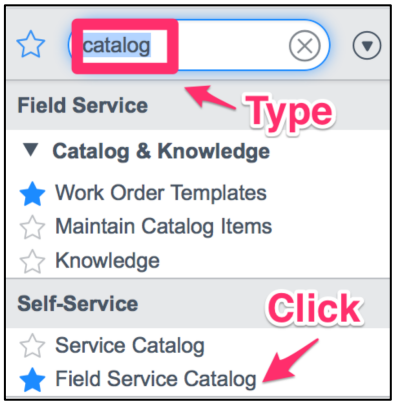
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16. Your screen should look like the example.

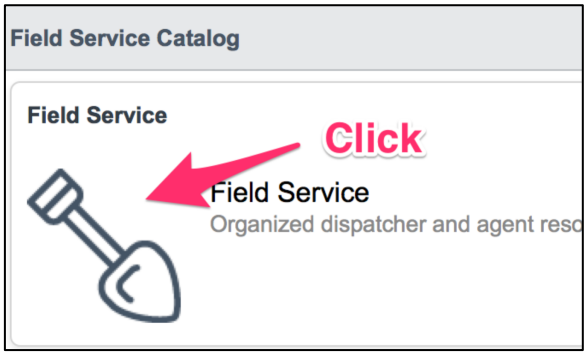


Verify That the Work Template Was Published

1. In the navigation filter box, type **catalog** and then click on the **Field Service Catalog** entry under **Self Service**.

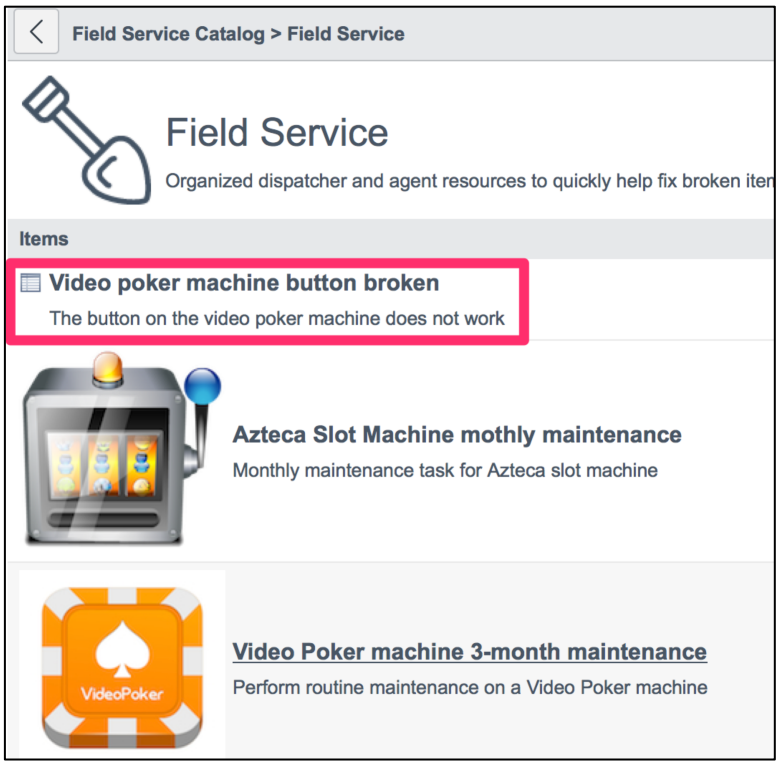


2. The Field Service Catalog displays. Click the **shovel** image to access catalog items.



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3. Your screen should look like the example.



Well done!

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Lab Goal

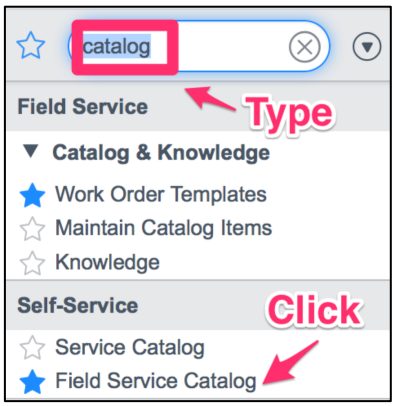
This lab explains how to create a new work order using the Field Service catalog item from the previous lab.

Once the work order is created, view the order on a map and manually assign the task to an available agent.

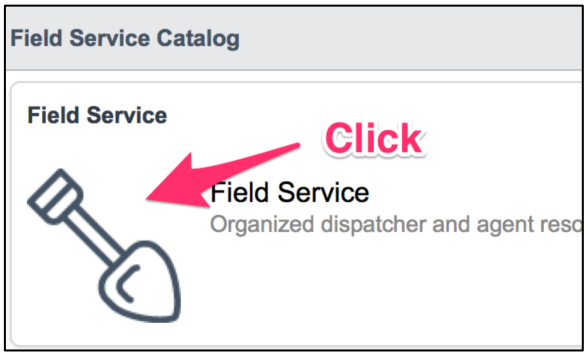
Lab 1.3 Create Order from Catalog

Create a Work Order from a Catalog Entry

1. In the navigation filter box, type **catalog** and then click on the **Field Service Catalog** entry under **Self Service**.

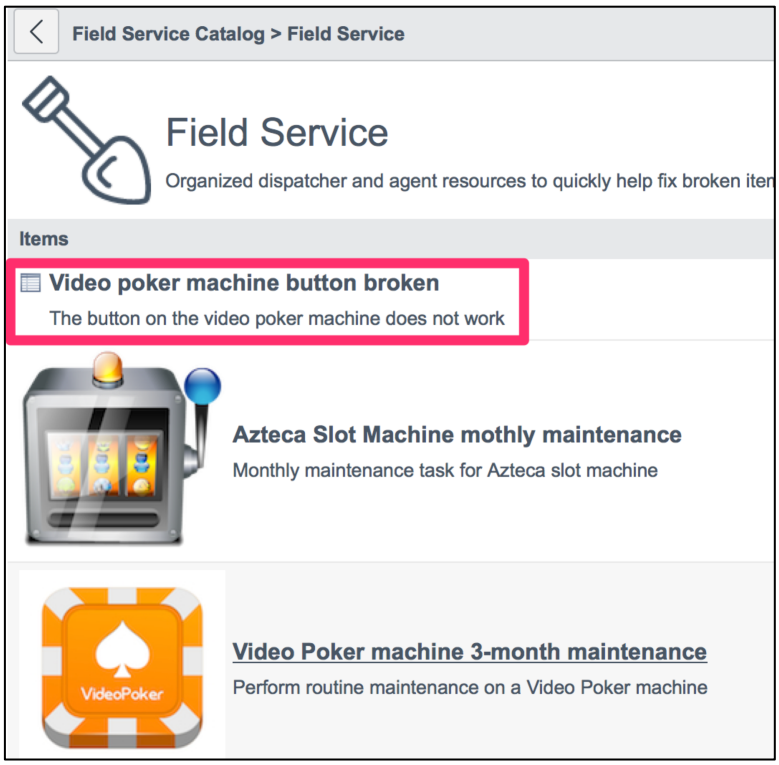


2. The Field Service Catalog displays. Click the **shovel** image to access catalog items.



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3. Your screen should look like the example.

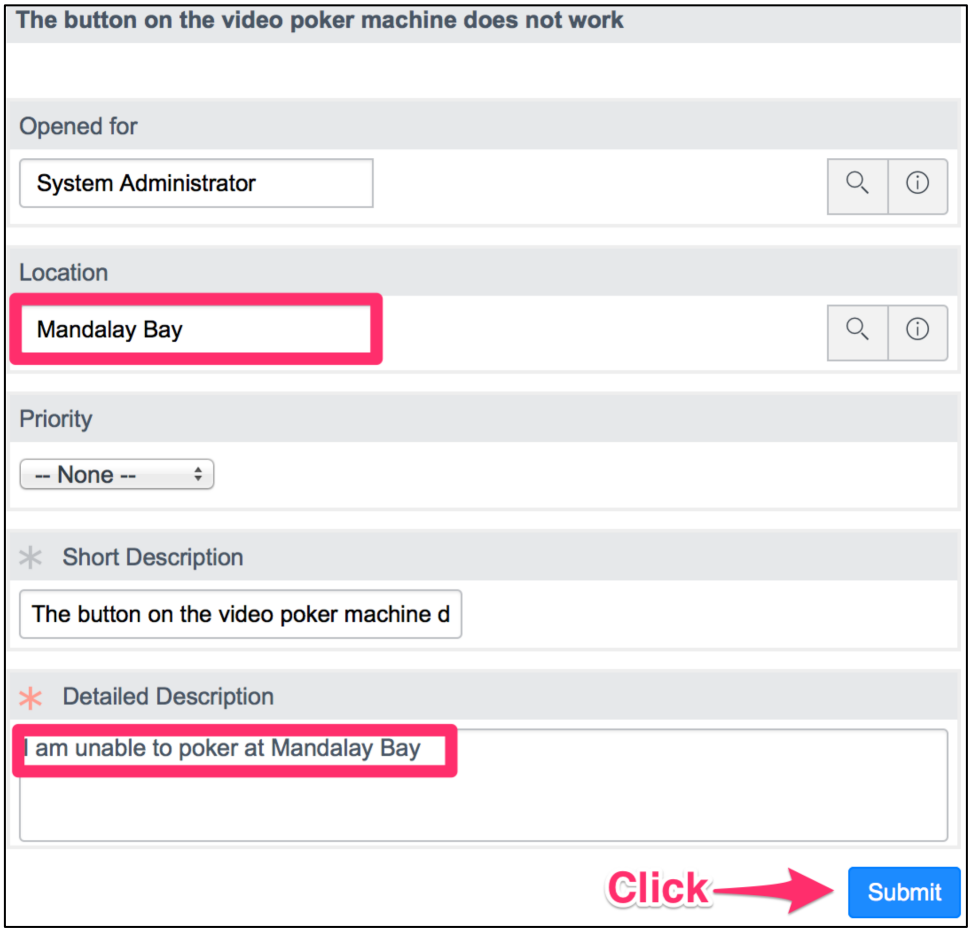


4. Click the **Video poker machine button broken** entry.

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5. Set the following:

   Location: **Mandalay Bay**
   Description: **I am unable to poker at Mandalay Bay** (or whatever you want)

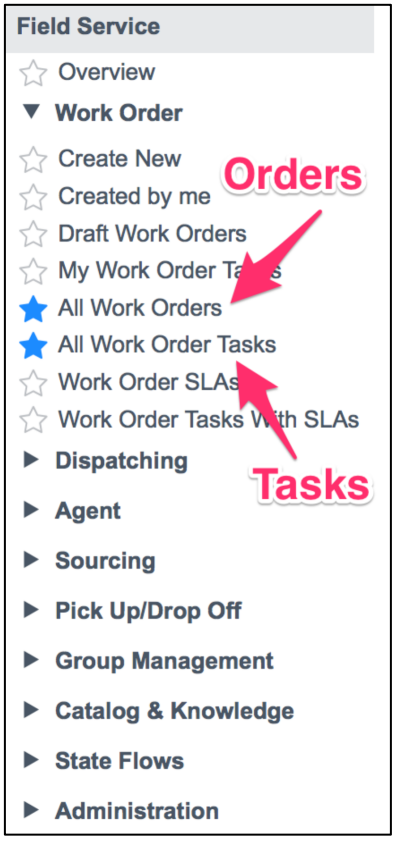


6. Click **Submit**. The following confirmation message appears:



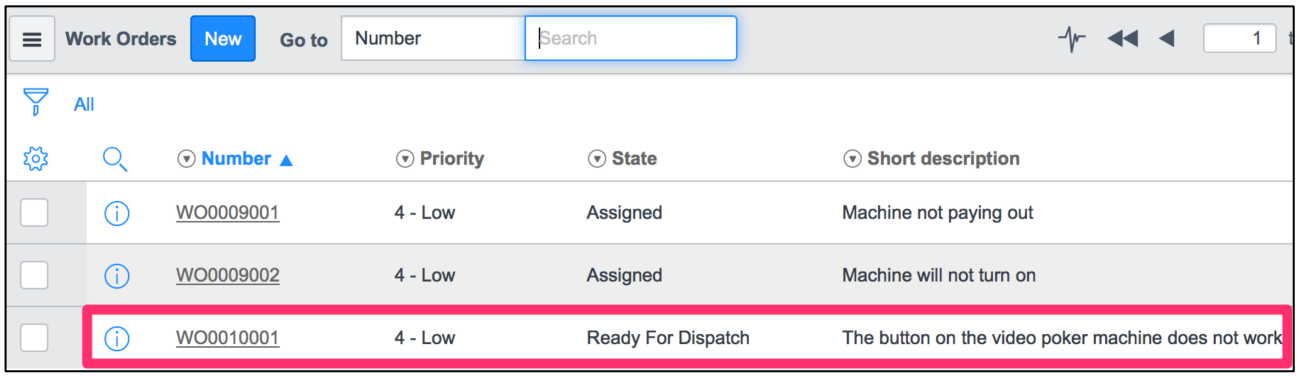
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7. Confirm that a work order was created: in the Field Service menu, under Work Order, click **All Work Orders**. You can also click **All Work Order Tasks** to see that 4 new tasks were created as well.

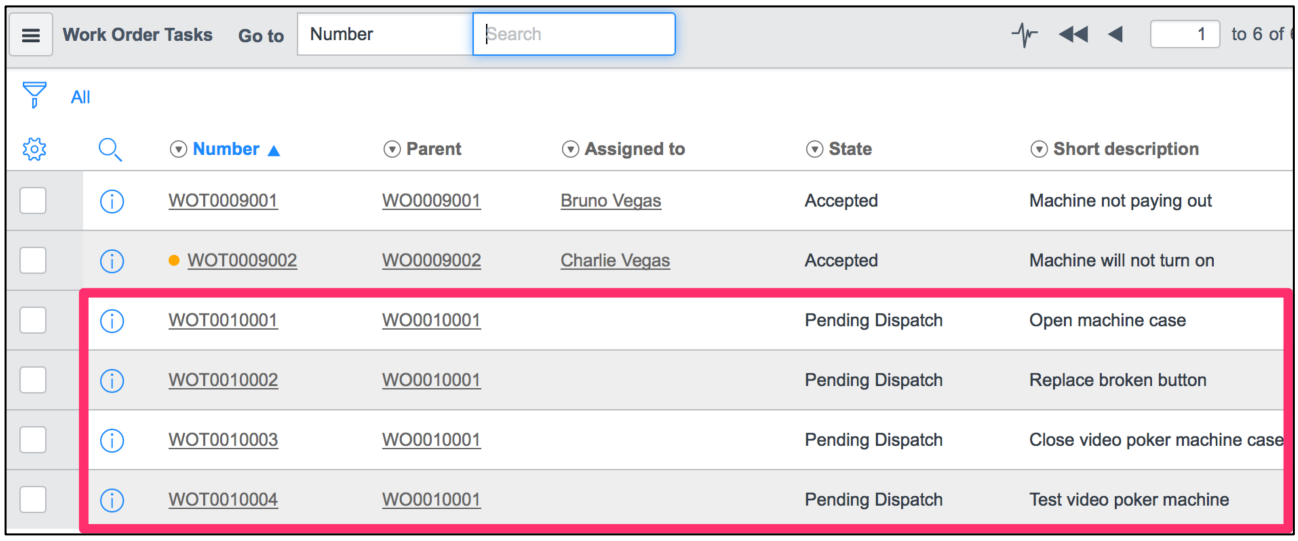


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8. Your screen should look like the example.

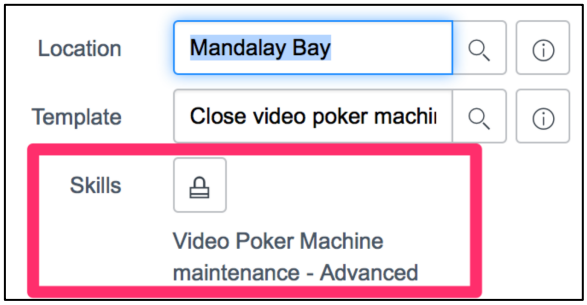


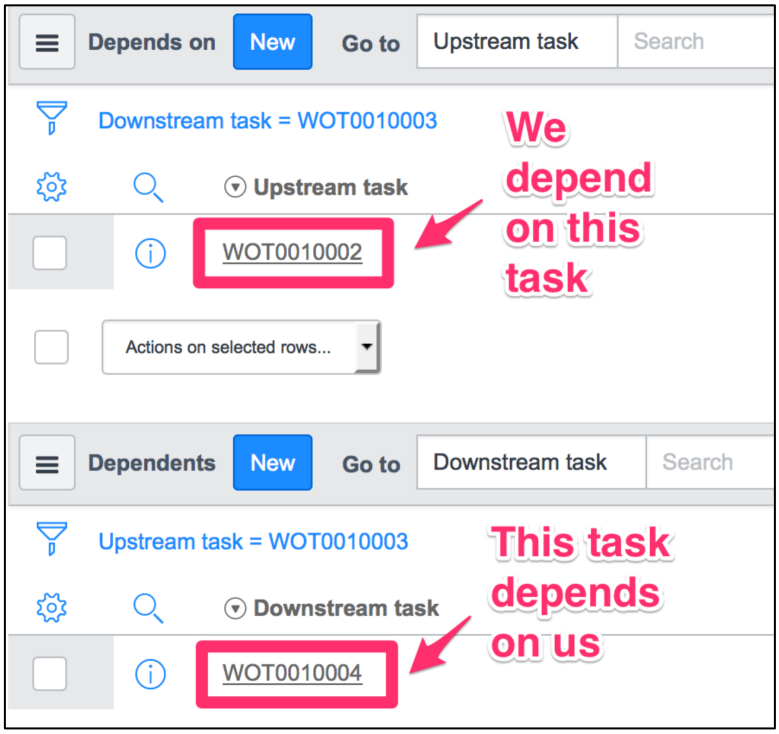
And for tasks:



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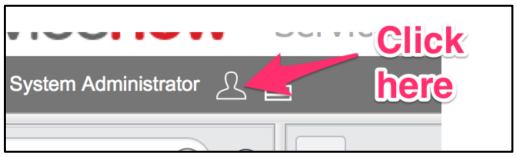
9. Confirm that the task dependencies were created: Click the **Close video poker machine case** task (your number may vary). The form shows the Skills assign as requested, and at the bottom of the form, the task dependencies are populated.

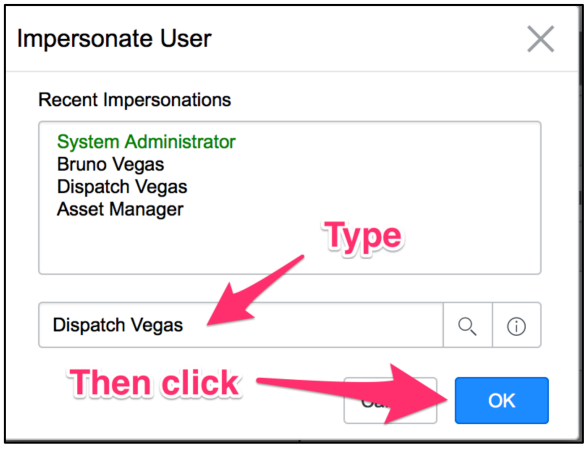




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10. Impersonate the Dispatcher to view work orders on a map. Click the **user** icon and type **Dispatch Vegas** into the box. Click **OK**.

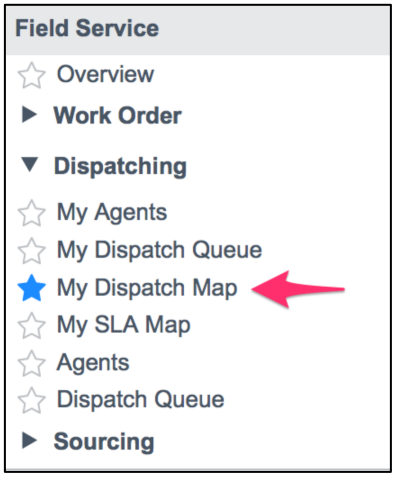




11. Your top left should look like the example.

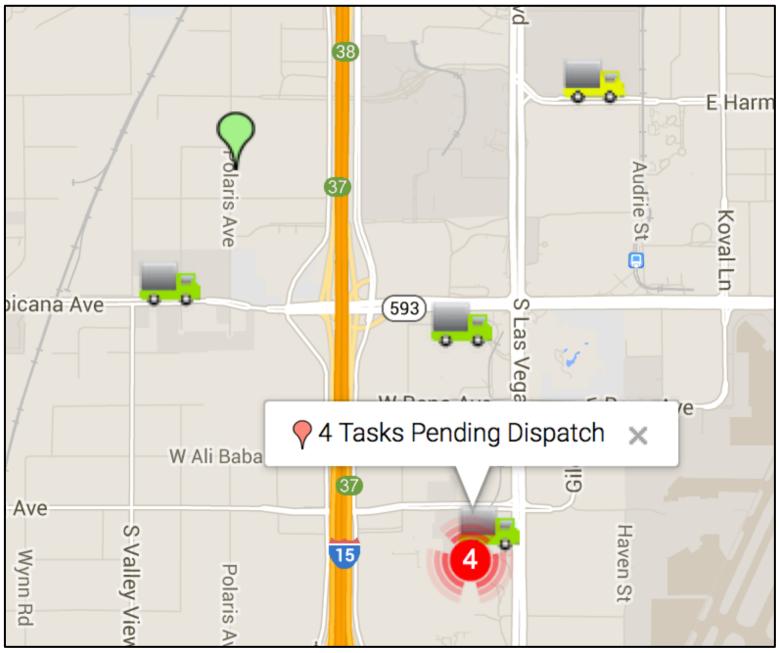


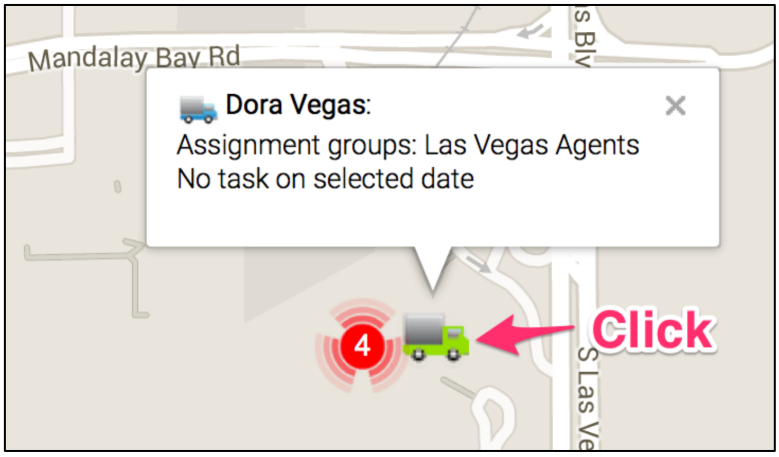
12. In the Field Service Menu, under **Dispatching** section, click **My Dispatch Map**.



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13. The screen displays a map centered on Las Vegas with a bright red **4** in the middle. Zoom in to see additional details.



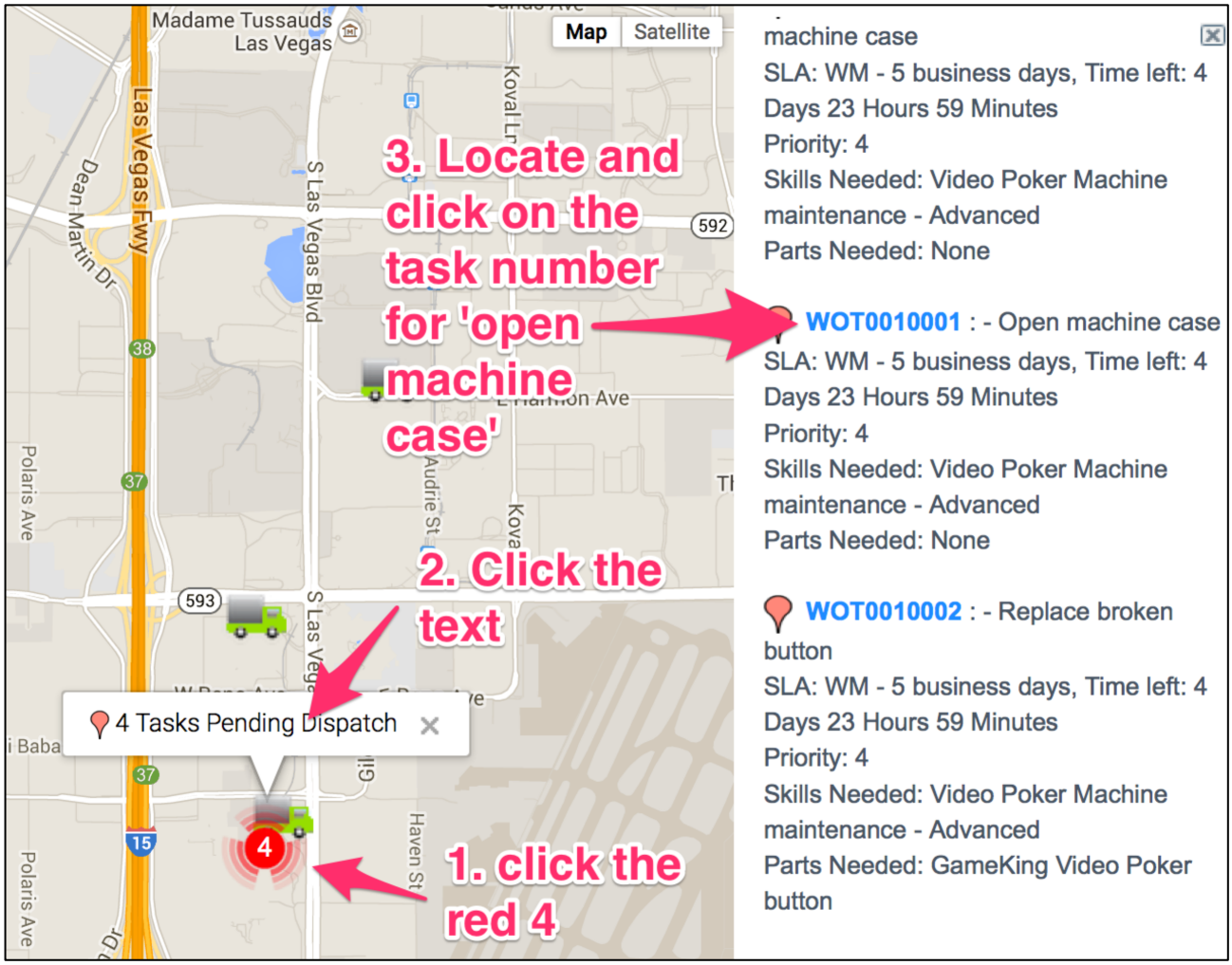


14. Click the red **4**. A description bubble opens.

15. Click the text bubble to see all four tasks listed on the right.

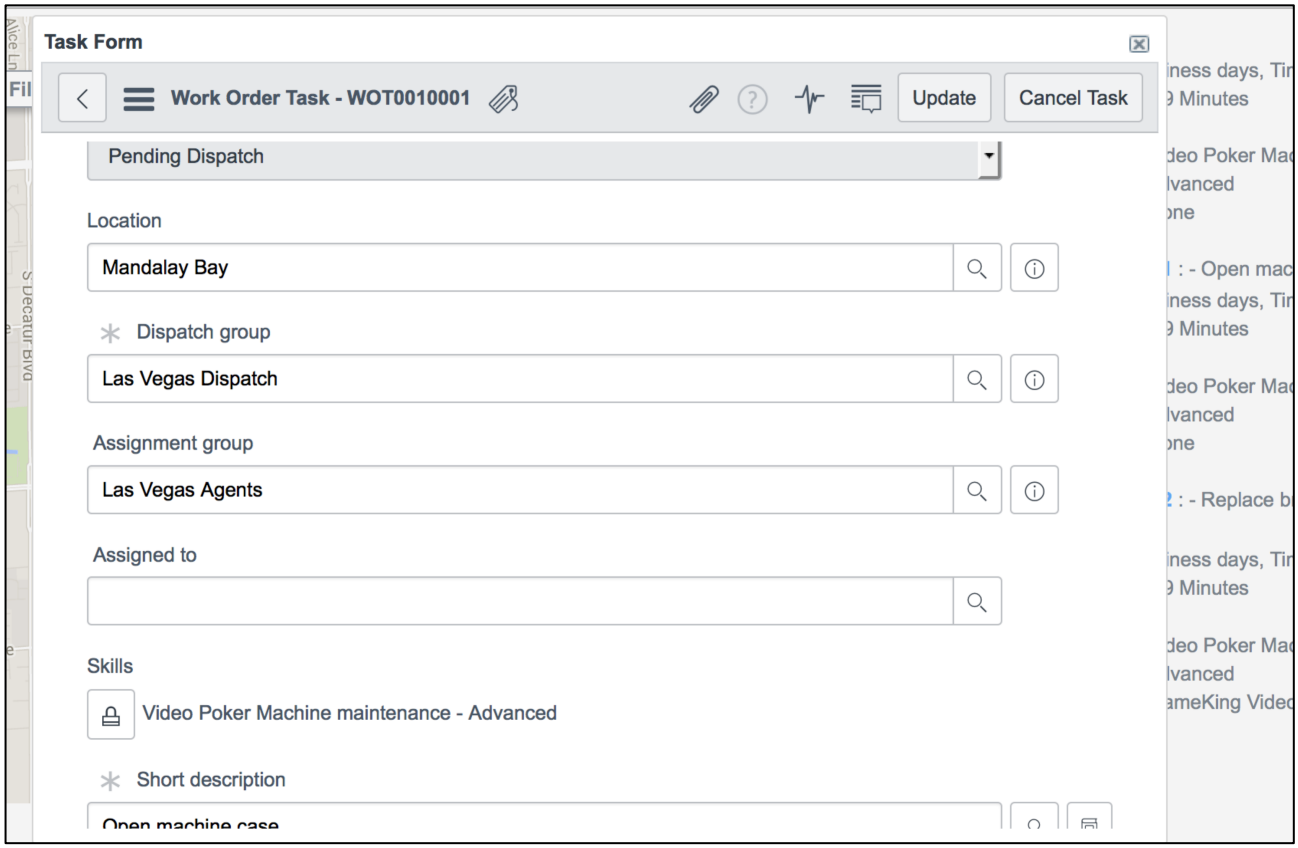
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16. Find the **Open machine case** task. Click the blue task number to view the task.



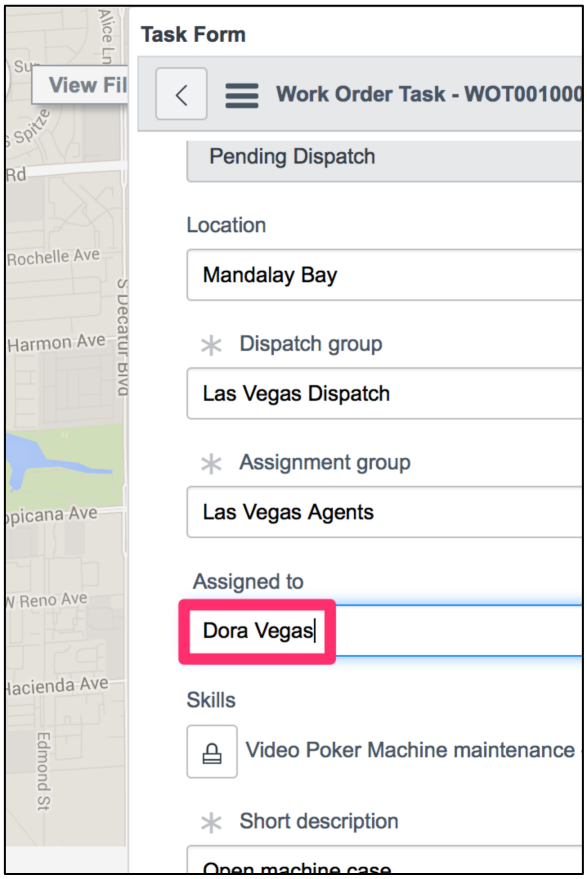
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17. After the task number is clicked, a task form popup displays.

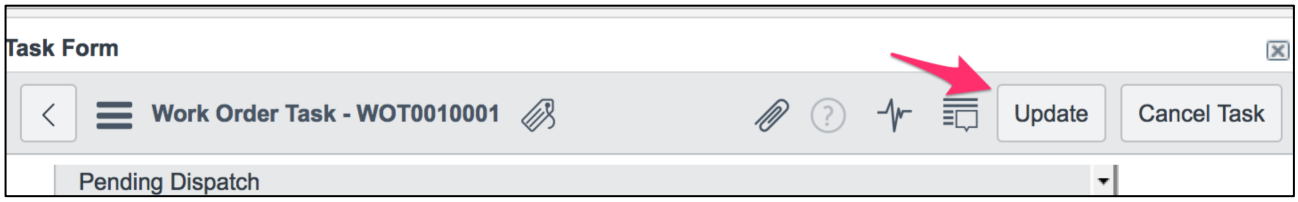


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18. In the **Assigned to** field, type **Dora Vegas** (it so happens that Dora is already at the Mandalay Bay, a fact we will use when we switch to using auto-assignment).

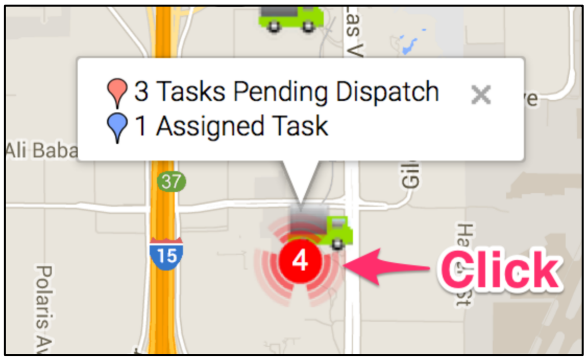


19. The task updates and the map redraws.



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20. Zoom in and click the red **4** again. Notice that tasks are pending and one task is assigned.



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Lab Goal

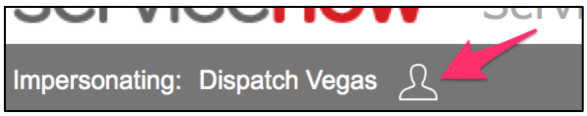
This lab explains how to turn on and configure Auto-Assignment. The flexible auto-assignment engine considers multiple factors to assign tasks to the most appropriate agent.

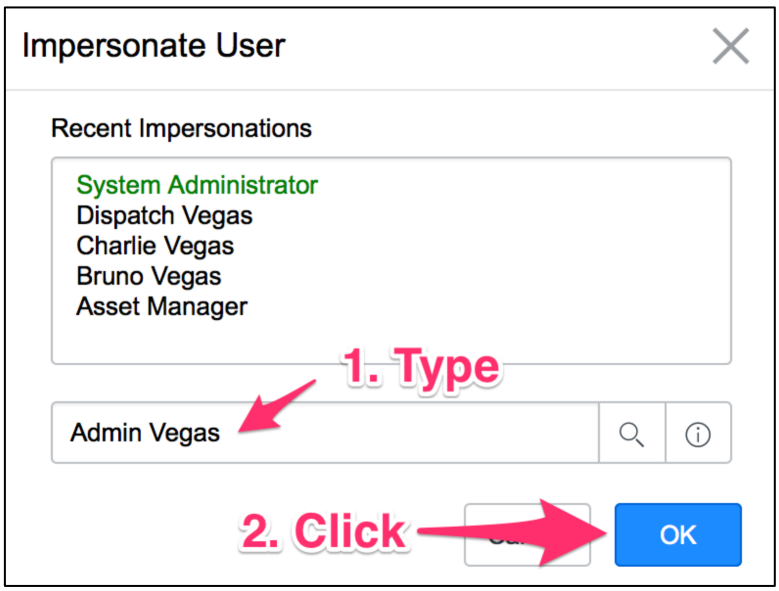
This lab also demonstrates that the Field Service Admin (**wm_admin**) can fully configure and control the Field Service application without requiring the system-wide **Admin** role.

Lab 1.4 Auto-Assign-ment

Configure Auto-Assignment

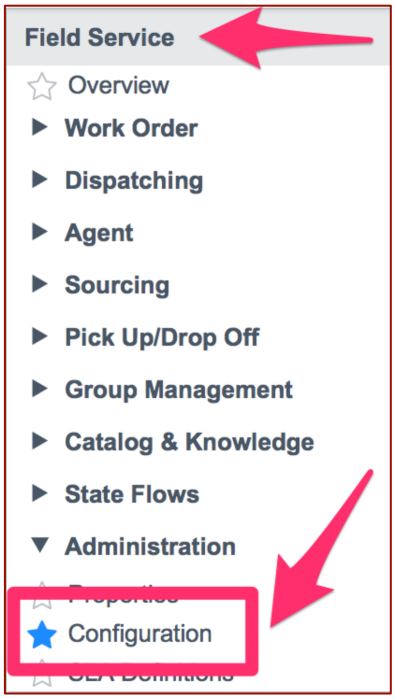
1. Impersonate the Field Service Admin, **Admin Vegas**. Click the **user** silhouette and type **Admin Vegas** in the box. Click **OK**.



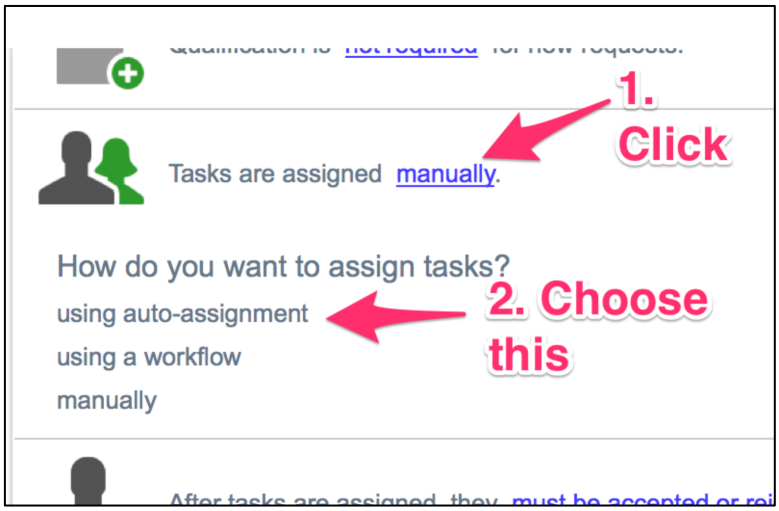


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2. In the Field Service menu, under the Administration section, click **Configuration**.

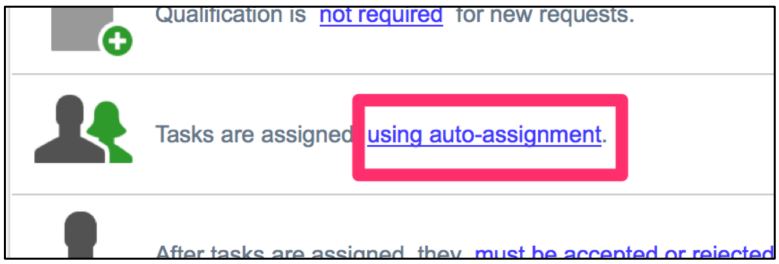


3. In the Business process section, change tasks to be assigned [using auto-assignment](#).

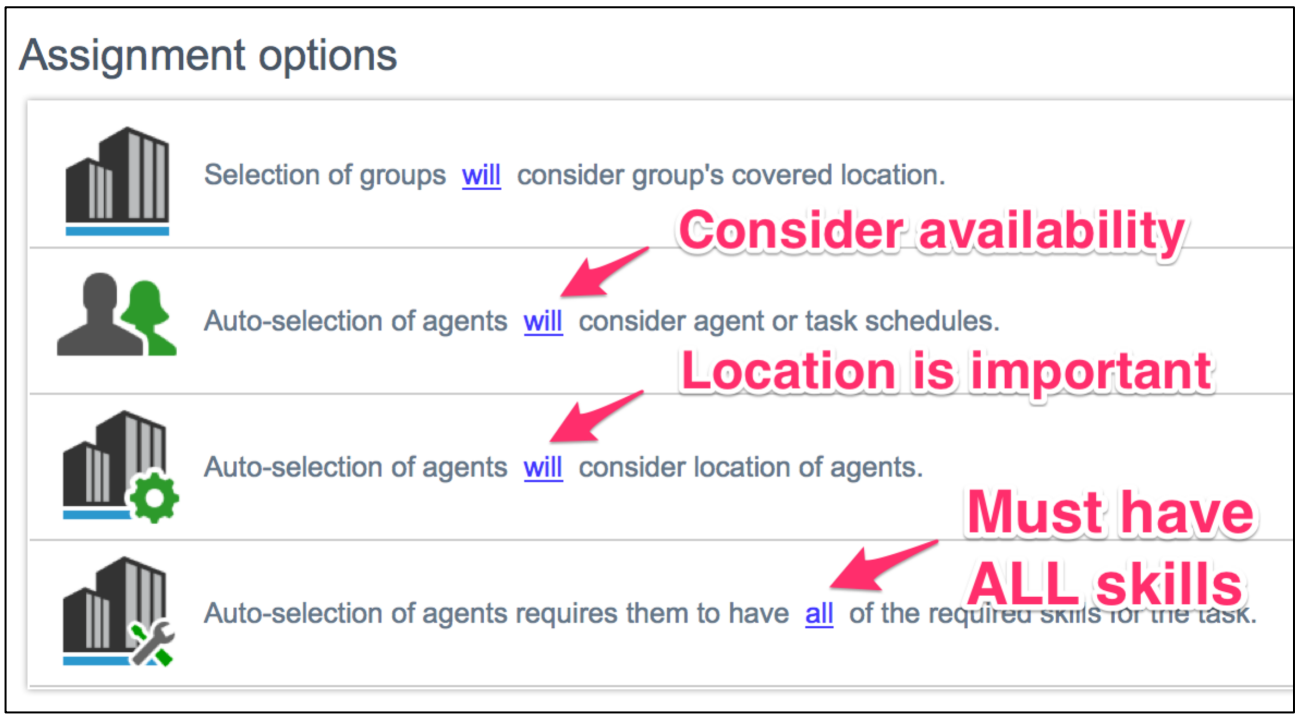


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4. Your screen should look like the example.



5. The Assignment options section of the configuration page now looks different.

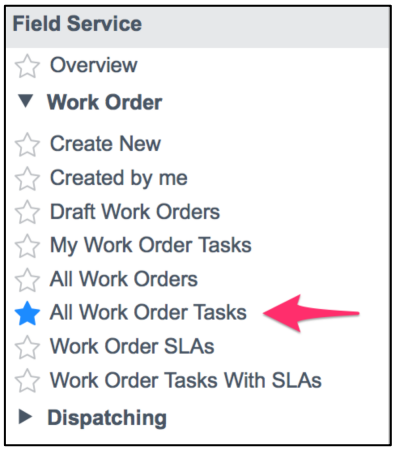


6. Remember to click **Save**!

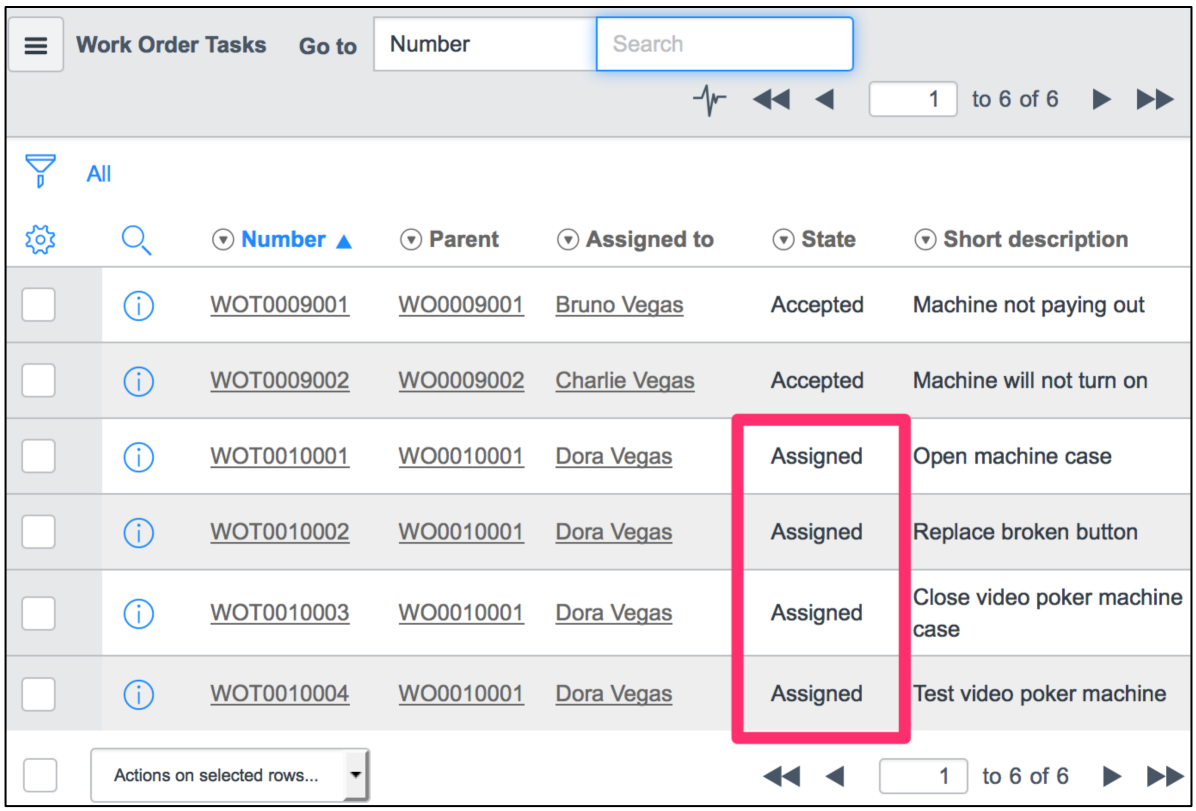


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7. In the Field Service menu, under the Work Order section, click ‘All Work Orders’ to verify all tasks are now assigned.



8. Your screen should look like the example.



(Your assignment may vary).

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Lab Goal

This lab explains how to use the agent mobile view to accept, perform, and complete tasks.

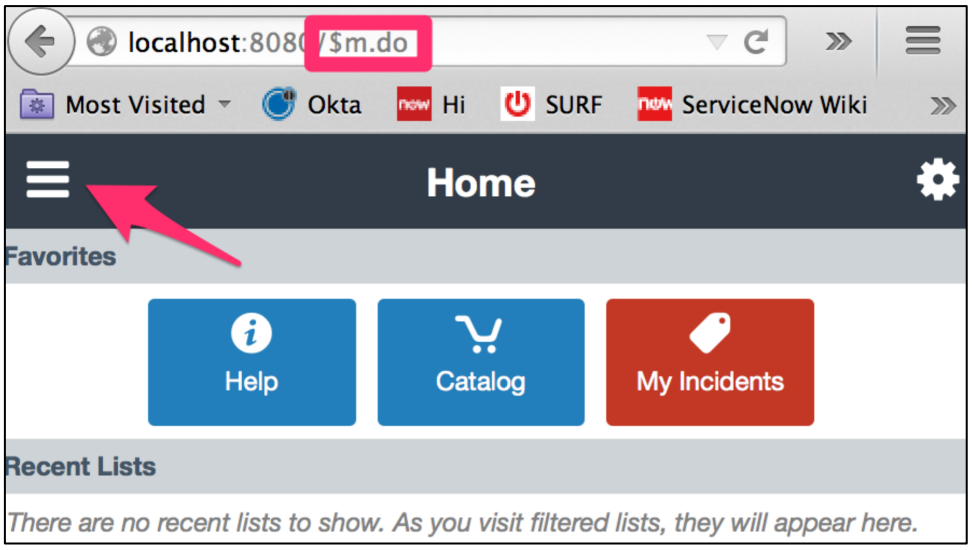
To accomplish this, you need an internet-connected smart phone with a web browser. If you do not have such a phone, just use your laptop to perform the same actions.

Lab 1.5 Agent Mobile View

Log in via Mobile

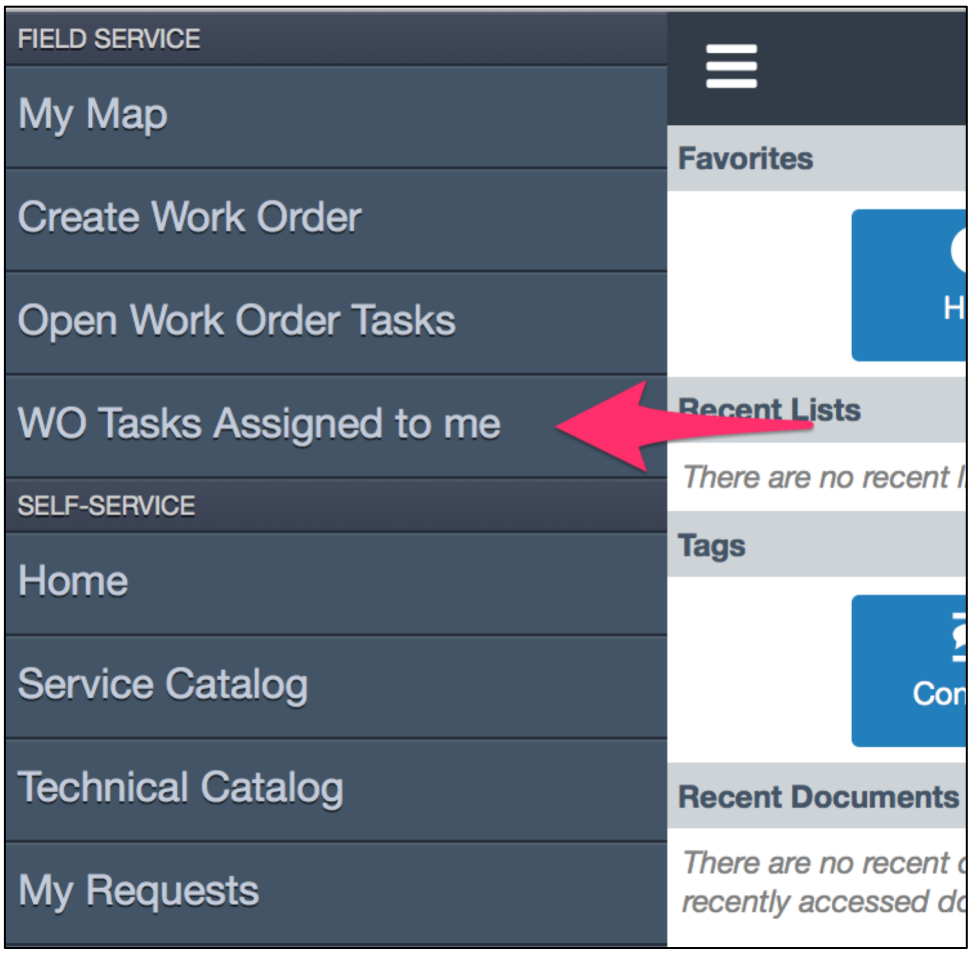
1. On your phone, access your assigned instance (the URL displayed in your laptop browser). If you want to follow on the desktop, log out of ServiceNow and log in using the credentials provided in the next step.

2. Login as **vegas.dora** with the password **'1234'** (i.e., the digits 1 through 4). If you are using a laptop, manually change the URL from **navigate.do** to **$m.do** to view the mobile pages.



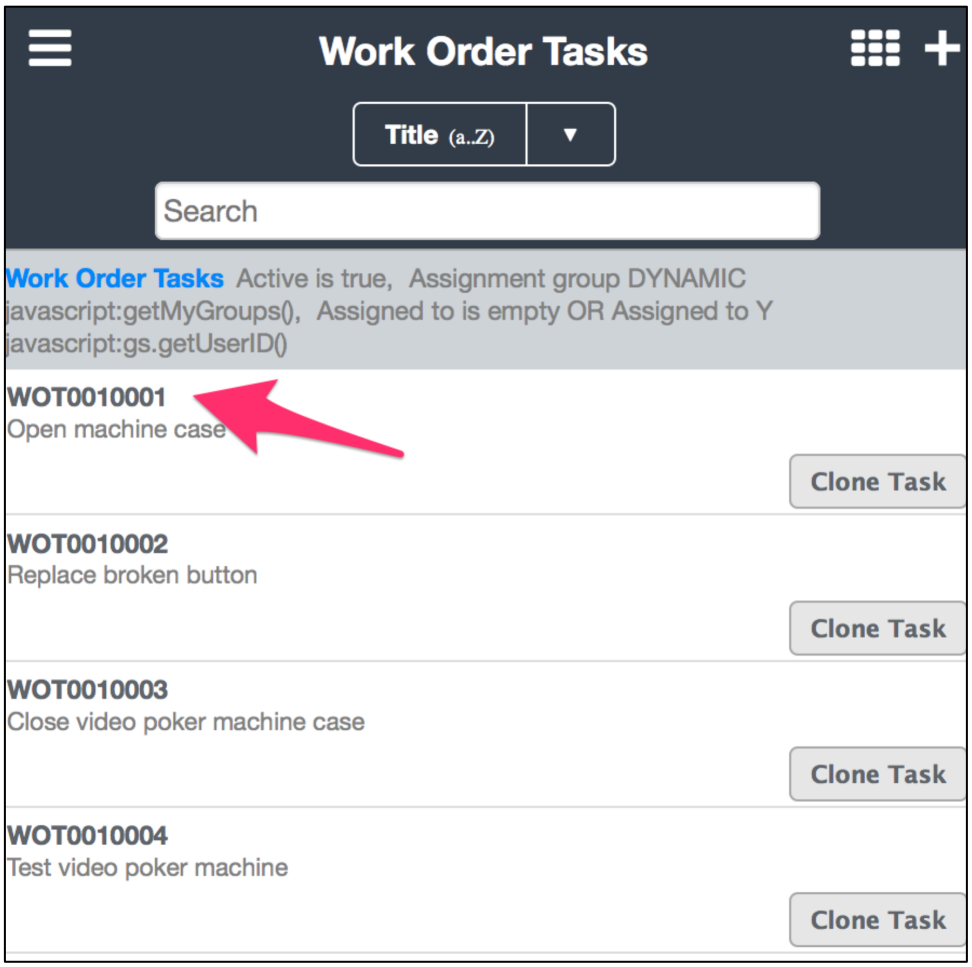
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3. Click the **hamburger** (three horizontal lines) and clicl **WO Tasks Assigned to me**.



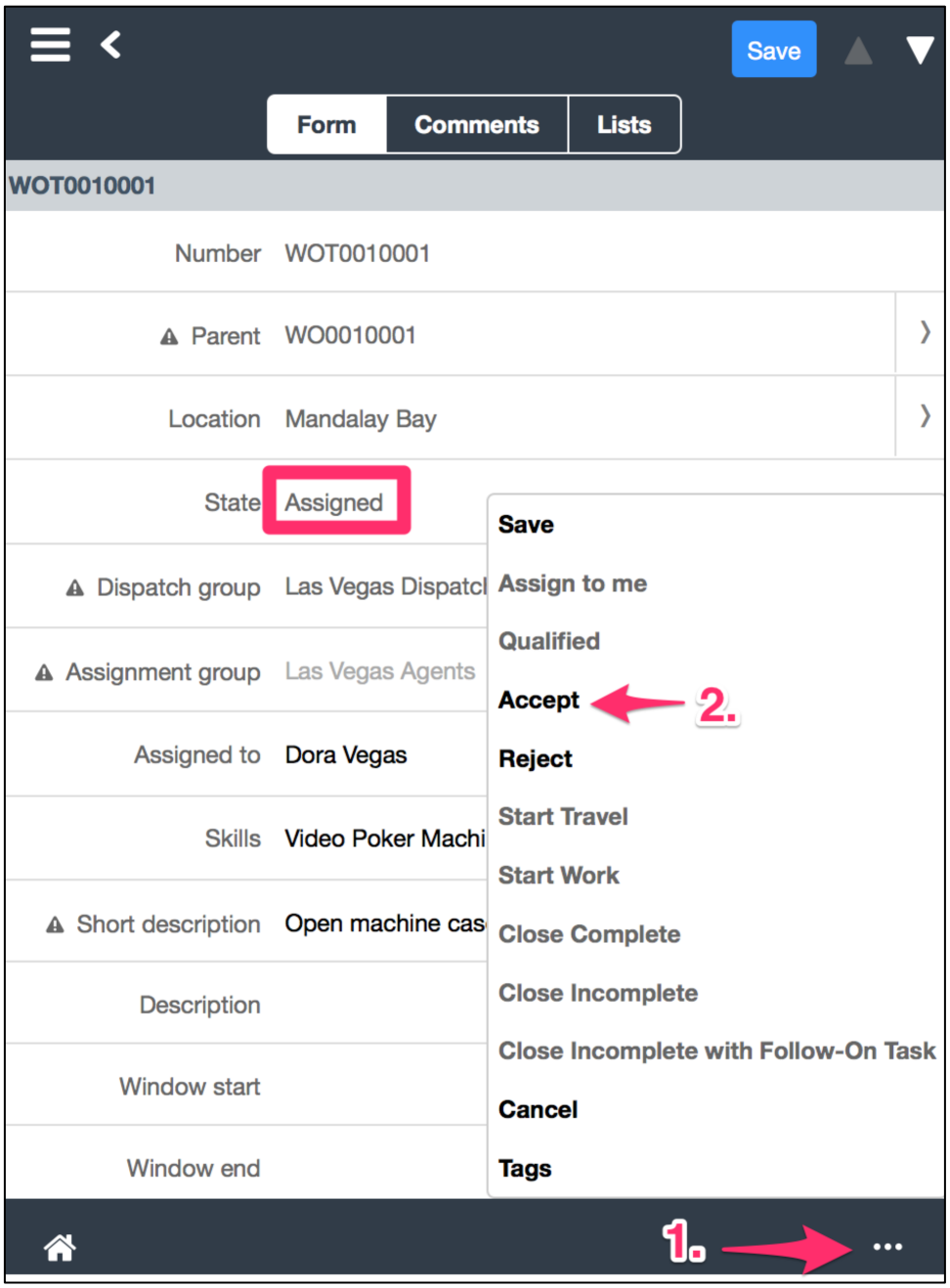
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4. Click the **Open machine case** task (click the task number).



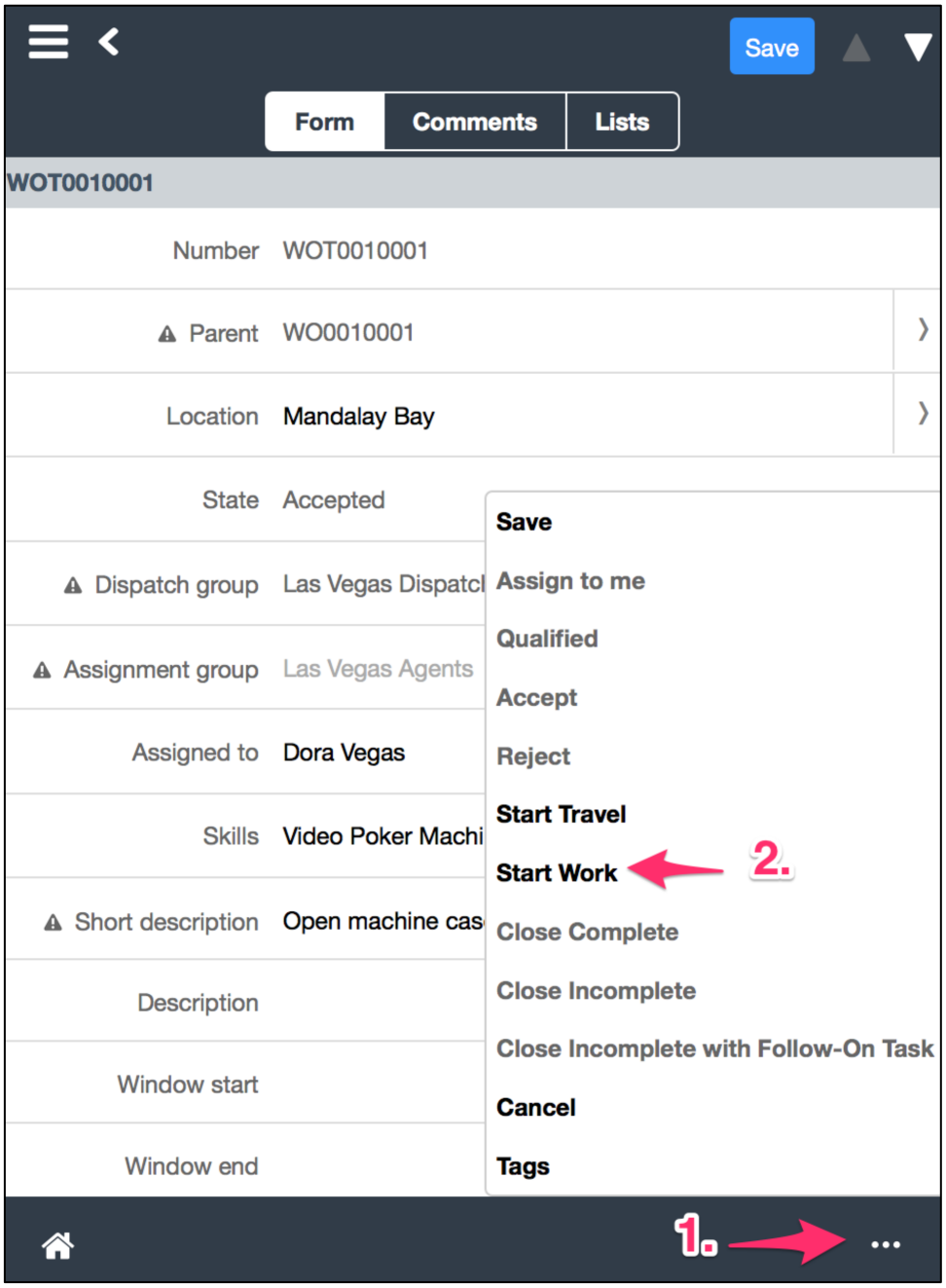
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5. Click the ellipsis at the bottom right and choose **Accept** to accept the task.



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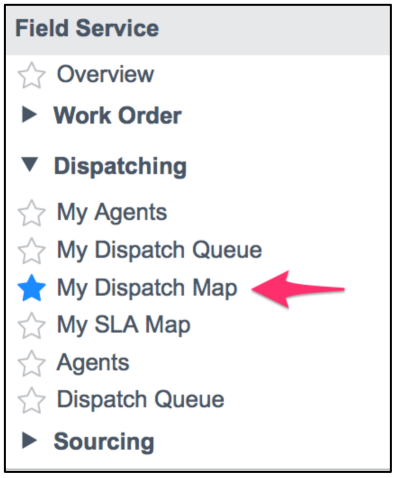
6. Click the ellipsis again and choose **Start Work**. The task state changes from **Accepted** to **Work in Progress**.



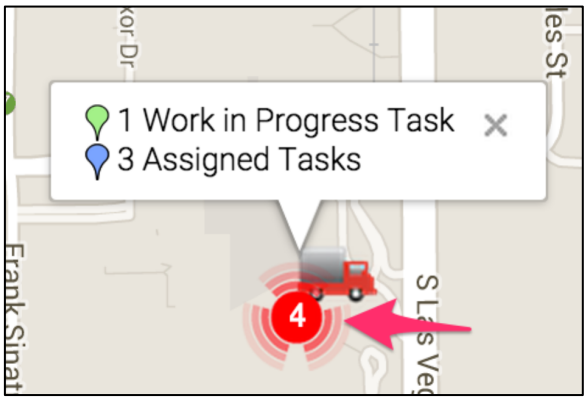
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7. On the laptop, impersonate **Dispatcher Vegas** (or login as **vegas.dispatch** with a password of **1234** if you logged out).

8. In the Field Service menu, under the Dispatching section, click **My Dispatch Map**.

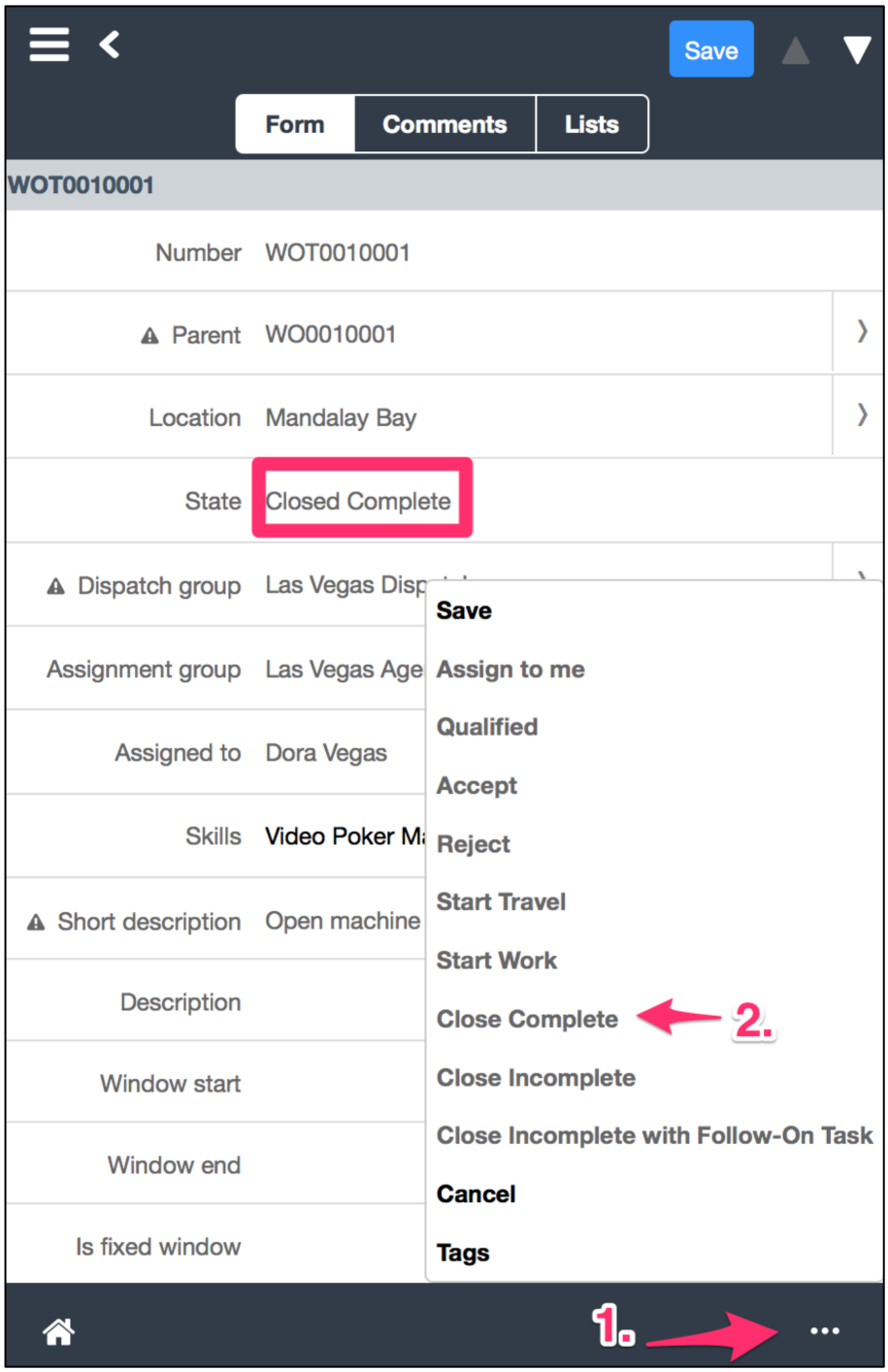


9. Zoom in and click on the red **4**. Note there is a task in **Work in Progress**.



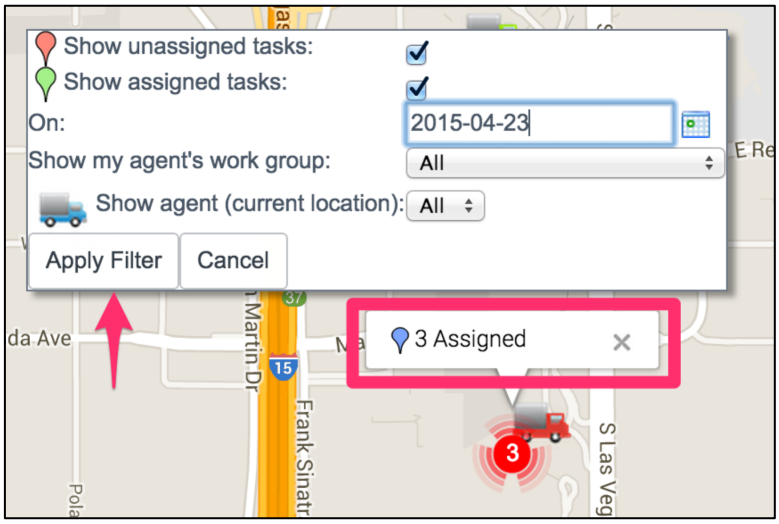
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10. On your mobile (or the browser showing the mobile view), close the task by clicking the ellipsis and choosing **Close Complete**. The task form shows the state is **Closed Complete**.



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11. In the Dispatch Vegas browser, refresh the dispatch map by either click **My Dispatch Map** again, or click **View Filter** at the upper left map corner and then click **Apply Filter**.



12. Note that the number of assigned tasks has gone down to only three. Clicking the number **3**, open the list of tasks on the right hand side of the screen.

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